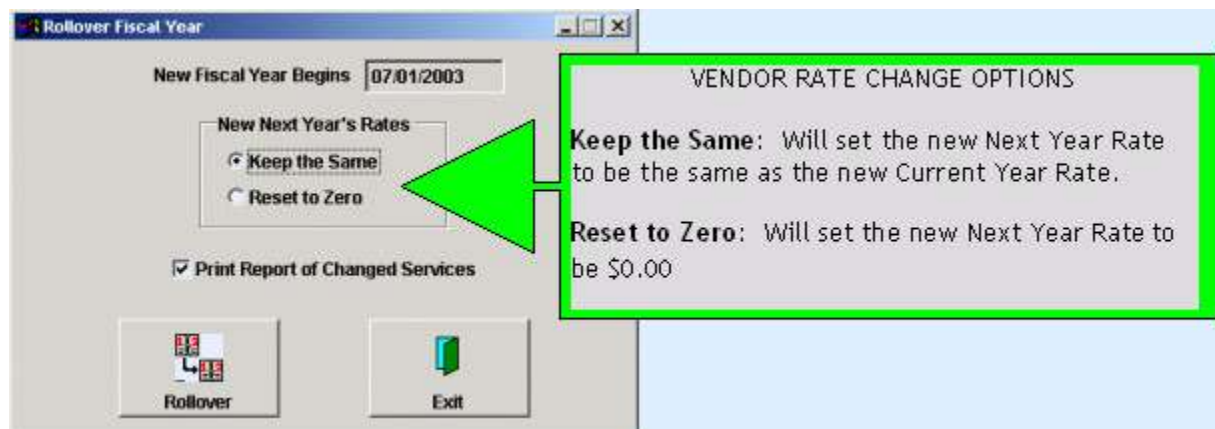


Fiscal Year Rollover

Procedures for completing Fiscal Year Rollover for AAA's.

- In INsite System Utilities >> Housekeeping, click on 'Fiscal Year Rollover'. The following screen will appear:



- Select the desired options and click 'Rollover'.

What will happen during the Rollover?

1. The Starting Date of the Next Fiscal Year will be changed in Supporting Data ☹️☹️Agency Name.
2. Vendor Rates will be changed. The Next Year Rate will move to the Current Year Rate and the Current Year Rate will move to the Prior Year Rate. The Next Year Rate will be set according to the option you selected.

Cost - Prior Year	Cost - Current Year	Cost - Next Year	Cost - Prior Year	Cost - Current Year	Cost - Next Year
13.00	14.00	17.58	14.00	17.58	17.58

Example rates before & after the Rollover using the 'Keep the Same' option

3. All of the services on care plans with a start date of July 1st of the new fiscal year or after will be changed to use the new rates.
4. If you choose to print the Report of Changed Services, that will print next. That will be followed by a report of client's whose care plans are now over the CHOICE cap.

5. A message will be displayed when the Rollover is complete.
6. Note: prior to completing the rollover on the laptops, be sure you have imported an updated vendor file.

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